

Facility:
Date:
Surveyor:

Preceptor Tracking Tool
Ambulatory Surgical Centers

Directions: The expectation is that not each task and objective would be covered each survey. In the first column, indicate if the new surveyor observed (O), required assistance to complete (R/A), or completed independently (I). For any task requiring assistance (R/A), please include specific comments regarding what assistance was needed. Indicate N/A in the space if it does not apply.

Item	O, R/A, I	Comments
Objective 1: Completes off-site survey preparation in accordance with Ambulatory Surgical Centers (ASC) pre-survey protocol		
Reviews facility information and makes copies as necessary		
Gathers all necessary worksheets and completes preliminary information		
Participates in the pre-survey team meeting		
Serves as Team Lead		
Objective 2: Conducts the Entrance Conference.		
Entrance Conference (See Task 2 ASC entrance activities)		
Provides and receives appropriate information (Form CMS - 278, patient and staffing lists) in accordance with the State Operations Manual (SOM) and ASC survey protocol		
Objective 3: Conducts the survey as outlined in the SOM		
<input type="checkbox"/> 1. Facility tour		
<input type="checkbox"/> 2. Patient tracer with infection control worksheet		
<input type="checkbox"/> 3. Policies and procedures		
<input type="checkbox"/> 4. Observations		
<input type="checkbox"/> 5. Interviews		
<input type="checkbox"/> 6. Document Review		
Objective 4: Completes post-survey activities		
Form CMS - 377		

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Item	O, R/A, I	Comments
Infection Control Worksheet		
Writes examples for Form CMS - 2567		
Ensures all necessary information is in the packet		
Review and Follow up with Plan of Correction (POC) or Allegation of Compliance (AOC)		
Prints Form CMS - 670 and Form CMS - 2567B		

General Comments and Supervisory Review:

Date:	Signature:
	Preceptor:
	Surveyor:
	Supervisor to Verify Review: